

SAIDE Policy on Open Educational Resources (OER)



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1 What is Meant by OER?

At its core, the concept of Open Educational Resources (OER) describes educational resources that are freely available for use by educators and learners, without an accompanying need to pay royalties or licence fees. A broad spectrum of frameworks is emerging to govern how OER is licensed for use, some of which simply allow copying and others that make provision for users to adapt the resources that they use. The most well known of these are the Creative Commons (CC) licences,¹ which provide legal mechanisms to ensure that people can retain acknowledgement for their work while allowing it to be shared, seek to restrict commercial activity if they so wish, and aim to prevent people adapting work if appropriate (although this may be legally difficult to enforce at the margins).²

OER is not synonymous with online learning or e-learning, and indeed, in an African context, it is anticipated that many of the resources produced – while shareable in a digital format (both online and via offline formats such as CD-ROM) – will be printable. Thus, it would be anticipated that a very high percentage of resources of relevance to African education will be shared as RTF or similar files (for purposes of adaptation) and packaged as PDF files (for purposes of printing).

Although the concept of OER unsurprisingly means different things to different people, from SAIDE's perspective, it rests on the following key assumptions:

1. Increased availability of relevant, need-targeted learning materials can contribute to more productive learners and faculty members.
2. Because OER removes restrictions around copying resources, it holds potential for reducing the cost of accessing educational materials.
3. The principle of allowing adaptation of materials contributes to enabling learners to be active participants in educational processes, whereby they learn by doing and creating, not just by passively reading and absorbing.
4. The potential of OER is best achieved through a collaborative partnership of people working in communities of practice, both within and across institutions (although sometimes also within them). Collaborative OER processes built on networks of peer members can lead to increased availability of relevant, need-targeted learning materials, achieving a better understanding of learners' needs and motivating meaningful contributions from participating institutions.

¹ For more details on the Creative Commons licensing framework and different licensing options, see [www.creativecommons.org](https://creativecommons.org/).

² For a detailed discussion of the concept of OER and associated licensing issues, see *The Potential of Open Educational Resources*, a Concept Paper prepared by SAIDE's OER Africa Initiative.

5. OER has the potential to build capacity in African education by providing educators with access, at low or no cost, to the tools and content that they need to boost their ability to produce high quality educational materials and complete the necessary instructional design to integrate such materials into high quality programmes of learning.
6. Without collaborative partnerships within Africa, and between African education institutions and those from other parts of the world, and the ensuing active ownership by African educators of resulting OER products (whether developed from scratch or adapted from existing resources), OER is likely to have limited, if any, meaningful impact on African education systems. Simply importing content into Africa from other parts of the world will do nothing to solve capacity and resource constraints in African education systems.
7. To be successful and sustainable, development of OER cannot be a sideline activity within an institution or education system. Development of learning resources needs to be integrated into institutional or systemic processes in order to both leverage its potential and provide for its sustainability. Likewise, policies, particularly around intellectual property rights, remuneration, and promotion, need to be adapted to support and sustain licensing of educational materials as OER.
8. The potential of OER includes facilitating collaborations between educators and students at different institutions, as well as establishing a new economic model for procuring and publishing learning materials. Ultimately, a key to its success will be to demonstrate that, in the medium- to long-term, OER will help over-stretched educators to manage their work more effectively, rather than adding new work requirements to their job descriptions.

2 Alignment of OER with SAIDE’s Mission and Vision

The concept of OER, as mapped out above, is strongly aligned to and supportive of SAIDE’s mission statement and its core aims. Specifically, SAIDE is ‘committed to increasing equitable and meaningful access to knowledge, skills and learning through the adoption of open learning principles and distance education strategies’. Open licensing of materials is designed specifically to deepen equitable and meaningful access to knowledge by reducing the cost of access to Intellectual Property that has been developed in education systems and prevent unnecessary duplication of efforts. Thus, in formally endorsing an OER position both by releasing its own Intellectual Property under relevant Creative Commons licences and encouraging others to do likewise, SAIDE believes it will be able to work to further open learning in African education systems. This will facilitate dissemination of information and growing equity in access to knowledge.

SAIDE sees the concept of OER as being of particular relevance in its primary field of distance education, because distance education systems and programmes are so heavily dependent on use of educational materials for communication of the curriculum. Investment in materials development is thus a key cost driver for distance education, and the economies of OER can serve to reduce the scale of investment required. Of course, SAIDE is aware of the risks of OER being coopted in a simplistic fashion as yet another cost-cutting strategy. Consequently, there is critical work to be done to ensure that educational decision-makers understand that open licensing of materials does not change any of the

requirements for investment in course design and materials development as necessary prerequisites for effective education. However, releasing the results of such investments under open licences can serve to improve quality and reduce cost over time.

SAIDE has been actively involved both in supporting and driving development of high quality educational materials, using experience in distance education materials design to help with the creation of excellent resources for use in distance, mixed mode, and face-to-face education programmes. During its existence, it has played an important role in modelling effective materials development processes, while also often being at the forefront of innovations in use of Information and Communication Technologies (ICT) of different kinds to support delivery of resources to learners. Thus, we see OER as a logical extension and development of the work we have been doing since our inception, rather than a change in strategic direction.

3 SAIDE's OER Africa Initiative

Within the above framework, SAIDE has housed an exciting new initiative called OER Africa since January, 2008. OER Africa's mission has been to establish vibrant networks of African OER practitioners by connecting like-minded educators from across the continent to develop, share, and adapt OER to meet the education needs of African societies. By creating and sustaining human networks of collaboration – face-to-face and online – OER Africa aims to enable African educators to harness the power of OER, develop their capacity, and become integrated into the emerging global OER networks as active participants rather than passive consumers.

OER Africa is aiming to make the following specific contributions to education on the continent:

- Work systematically with partners to enhance organizational capacity in education to design, develop, and deliver quality education programmes and materials;
- Advocate the merits of collaboratively creating and sharing intellectual capital in education as a mechanism to improve quality and enhance long-term cost-effectiveness;
- Help education institutions and governments to establish supportive policy frameworks that support openness in the development, adaptation, and use of educational resources, and convert this into sustainable business models;
- Facilitate the re-development and reinvention of African education programme curricula and course materials in order to ensure that education programmes on the continent are of exceptional quality and direct contextual relevance, producing world class graduates; and
- Where needed, support related quality assurance and evaluation processes.

OER Africa's vision is one of vibrant, sustainable African education institutions that play a critical role in building and sustaining African societies and economies, by producing the continent's future intellectual leaders through free and open development and sharing of common intellectual capital.

As OER Africa has completed a detailed phase of planning, it will now be adopted as a SAIDE 'brand', which comes to incorporate all of SAIDE's OER-related activities. This will serve to ensure that there is no confusion beyond SAIDE about the relationship between the two, while providing a potentially powerful marketing mechanism for aggregating the substantial OER-related work that SAIDE has done – and continues to undertake. The result of this re-positioning will be that:

- 1) OER Africa will become SAIDE's organizing framework for its OER-related activities, with a cluster of relevant SAIDE projects connected to it.
- 2) Individual projects will be managed by the relevant project managers as normal, and they will remain accountable to SAIDE through existing management lines. However, a SAIDE staff member will be appointed as SAIDE's OER Coordinator to take responsibility for coordination of OER activities, seeking to ensure that the whole equates to more than the sum of the parts. This will require, at least, a quarterly OER Strategy meeting, where all relevant project managers will convene to discuss potential points of intersection and leverage, identify opportunities for collaboration, and explore common strategies to take forward SAIDE's OER agenda (which itself will be continually refined through these and other planning discussions).
- 3) The OER Africa website – www.oerafrica.org – will be transformed from a project website into SAIDE's primary online OER vehicle, tightly integrated with the corporate SAIDE website. Thus, www.oerafrica.org will be re-branded as appropriate to demonstrate that it is a SAIDE website, while all online, OER-related activities and resources will become primarily accessible through www.oerafrica.org rather than www.saide.org.za.
- 4) SAIDE will become a member of the Open CourseWare Consortium and other relevant fora as appropriate in order to ensure that it becomes increasingly connected to networks of common interest in the area of OER.

4 SAIDE's Approach to Licensing its Materials

As licensing of Intellectual Property is central to the OER concept, SAIDE will adopt, as a default licence for all products produced through its various projects and engagements, a Creative Commons (BY) licence. The following caveats should be noted in this regard:

- 5) Such a licence will not apply to any projects where a client has a specific request for a different arrangement included in its terms of contract. However, in instances where licences are not specified, SAIDE will encourage – particularly within the donor community – inclusion of this licence provision in contracts.
- 6) The Creative Commons (BY) licence has been chosen as the default licence because it is the most open of all the CC licences. Effectively, all it requires a user to do is attribute the original authorship of the materials when using or adapting them, but otherwise leaves them free to adapt them as they deem necessary and use them in whatever way they wish. There may be instances where it is necessary to add further restrictions within the CC licence framework (possible applying a Non-Commercial restriction to prevent commercial use of materials, a Share-Alike restriction to require people adapting materials to release the adapted resource under a similar licence, or a restriction to prevent adaptation of the resource). However, imposition of additional

restrictions will be managed as exclusions rather than as a matter of policy in order to ensure the maximum possible openness wherever possible.

To facilitate sharing of its materials, SAIDE will work to ensure that every document released for distribution via the Internet (both through the SAIDE and OER Africa web platforms) will:

- 1) Indicate the licensing conditions of the resources clearly on the first page of the document and in the footer on every page.
- 2) Ensure that the resource is appropriately branded on every page to attribute the origin of the document correctly. In many instances, this will simply require incorporation of a SAIDE logo, but more complex arrangements may be required in the event of resources that have been co-produced with other parties.

5 OER-Related Activities at SAIDE

To facilitate broad take-up and use of the concept of OER in education systems, both within South Africa and across Africa more broadly, SAIDE's approach, wherever possible, will be to try to build relationships with existing networks of educational organizations and/or individuals and provide support of different kinds both to the networks and to individual organizations participating in them. This support takes three possible forms, each of which is designed to support and reinforce the other activities:

1) Institutional Policy Engagement

Success and sustainability of OER is predicated upon its meaningful integration into the institutional processes of a university. Accordingly, SAIDE will offer interested organizations practical support in the mapping and review of their existing policies (whether these be national or institutional) with regard, for example, to intellectual property rights, materials development, and remuneration. We will facilitate the adaptation of such policies or indeed their elaboration into an over-arching OER policy framework that, in accordance with their particular circumstances, will support and sustain the development and use of OER in education systems in Africa.

Generally, this process begins with a round of sensitization and initial exploration with senior management. Where interest is expressed, we begin a process of structured engagement with organizations to help them to create environments that support extended development, adaptation, and use of OER as one of many strategies to improve educational quality and ensure cost-effective operations.

2) Development/adaptation of OER for education programmes and courses

A key area of operation for SAIDE is to provide support to education organizations and systems in development and/or adaptation of OER, in order to model how such resources can serve simultaneously to improve the quality of education programmes and to manage delivery costs of those programmes more effectively. SAIDE is currently engaged in a variety of activities in this area, ranging from small proof-of-concept pilots to demonstrate the potential of OER by creating materials for a single module within a programme to engagement in processes aimed at producing comprehensive sets of OER for entire programmes. In general our support will focus on:

- a) Supporting initial design and planning of the proposed development process;

- b) Assisting organizations to complete audits of their materials in order to catalogue their intellectual property and the copyright conditions governing those materials;
- c) Providing ongoing guidance regarding licensing issues;
- d) Searching global repositories and other appropriate sources for potentially relevant materials once the curriculum focus for the project is defined;
- e) Targeting the global OER 'movement' to make requests for materials to broaden the above searches on behalf of African education organizations;
- f) Facilitating materials development/adaptation processes where required in order to ensure high quality of the resulting materials;
- g) Supplying instructional design expertise to support the process as appropriate;
- h) Providing management support to materials development processes where this is required (most often found to be useful when such processes involve collaboration between two or more organizations);
- i) Assisting with generation of meta-data for OER produced (whether new or adapted); and
- j) Using the OER Africa platform – www.oerafrica.org – to make OER produced in Africa accessible to the global OER community, across a range of educational sub-sectors.

3) *Support to collaborative networks*

Finally, SAIDE has become increasingly engaged in providing support of different kinds to nascent or existing collaborative networks, in line with the vision outlined in this policy. Whilst the particular services provided in this area are obviously highly dependent on the needs of the network and its current status, the kinds of support that SAIDE provides might include:

- a) Assisting to convene the network (particularly in instances where a need for collaboration has been identified, but no functioning network yet exists);
- b) Facilitating processes to design collaborative projects for such networks;
- c) Supporting development of funding proposals for the network (particularly important as much collaboration is undermined by the limits of available funds to allow institutions to dedicate human capacity to collaborative activities);
- d) Managing collaborative projects in the field of OER, where this is requested by the network;
- e) Providing online tools for collaboration and sharing through the OER Africa website; and
- f) Providing other forms of support as appropriate to help to ensure the success and sustainability of the network.